



# Catawba Valley Chapter

April 2018

## Message from the President

Hello IMA Members,

The craziness of March is behind us, both in weather and tournament play, and we are moving forward to Spring and warmer weather. We are near the end of our IMA year, this is a good time to look at what we have accomplished and to see the challenges ahead.

In this fiscal year, we have hosted several events holding some events in the late afternoon, with not as much success as we had hoped, it appears that time is great for students, but not a good time for those in business. We helped a family in need during Christmas, and while that is something we have done in the past, this family was struggling with the loss of a parent as well. The two Conferences we hold each fiscal year were a success, and we are improving our Webinar's of those events each time. This year we had the honor of hosting the Carolinas Council's winter meeting at our Asheville Conference. Our Scholarship program has offered the award to a student this year, and it will be awarded soon. The selected winner has finished with her Associates degree and is looking for acceptance to continue her degree in Accounting. Once confirmed, we will formally announce the award, and host the presentation. This has been a busy year!

Please accept my personal Thank You for all who have volunteered their time to accomplish the events this year. Our Chapter continues to hold high quality events, and none of this would be possible without your time.

As I look forward to our next fiscal year with the IMA, I see our biggest challenge is communication. Certainly we have this Newsletter, and our Website, but sometimes we stumble over communicating clearly and continually with each other. Several times this year, there were times when we should have spelled out what we expected or what had been decided to the entire Board. I take responsibility for this, as the President, I should be leading by example. I will do my best to improve 'getting the message' out. This year we should bring more people to the awareness of what the IMA stands for, how it can help them in their careers, and how important informed employees are to employers in the area. This can be done in many ways; we should make more presentations to the local College classes, have a booth at a Job Fair or at a College event, continue the Scholarship program, get our message out – tell people you know about us, help grow our Chapter. Are we up to the challenge, I believe so, with your support. Please share any ideas or time – it may be the key needed to boost our Chapter's growth.

Due to some scheduling issues, we **WILL NOT** have meeting in April of this year. We are working on a great presentation for our May meeting, the last of our fiscal year. Please stay tuned for more information.

"Volunteers do not necessarily have the time; they just have the heart." — Elizabeth Andrew

Respectfully,  
Ellen Knauf

### UPCOMING EVENT:

**FRIDAY- MAY 18, 2018**

**Luncheon Meeting  
Lake Hickory Country Club  
(No meeting in April.)**

**Topic and Speaker to be determined.**

**MEMBERS - \$17  
STUDENTS - \$10  
GUESTS - \$20**

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## *JOB OPENINGS*

If your company is looking to fill a position and you'd like to advertise it in the IMA newsletter, please forward the ad to Beth Prewitt at [dbprewitt@hsm solutions.com](mailto:dbprewitt@hsm solutions.com) by the last day of the month preceding the month in which you want the ad to be printed.

## Calendar of Events

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### DATES FOR 2017-2018 MEETINGS:

May 18<sup>th</sup> – Lunch meeting at LHCC

### **Mission Statement**

To provide personal and professional development opportunities in management accounting, financial management and information management through education and association with business professionals and certification in management accounting and financial management to members in the Catawba Valley area.

**RSVP to SHERONDA FOX at 828-328-2201, ext. 3223 or [sffox@hsm solutions.com](mailto:sffox@hsm solutions.com) by Tuesday before each meeting.**

**2017 – 2018  
Catawba Valley IMA  
Officers**

**President:** Ellen Knauf  
**President-Elect:**  
**Treasurer:** Beth Pernell  
**Secretary:** Charlie Nartker  
**Administration:** Charlie Nartker  
Team Leader  
**Communication:** Kim Gales  
Team Leader  
**Membership:** Danette Landrum  
Team Leader

**2017 – 2018  
Catawba Valley IMA  
Directors**

- **Publicity:** Kim Drum-Gales
- **Webmaster:** Lindsey Huffman
- **Asst. Webmaster:** Rhonda Young
- **CMA Program:** Ron Nicholson
- **Employment:** Beth Prewitt
- **Meetings (RSVPs):** Sheronda Fox
- **Newsletters:** Kelly Frank
- **Education:** Ron Nicholson
- **Student Activities:** Lacy Sanchez  
Chelsea Ledford
- **Scholarship:** Mike Gahagan
- **Membership:** Rhonda Young  
Dee Strickland  
Brenda Craig
- **Carolina Council Delegate:** Ron Nicholson  
Ellen Knauf

*IMA has updated their website. Please make sure your information for your profile is correct. To access you data go to [www.imanet.org](http://www.imanet.org). Under the [IMA Membership](#) section click on “**LOG IN**”. Your log in is your IMA membership number and your password is your last name, then click on “**GO**”. In the upper right hand corner of the screen you should see “Welcome, (your name) | “[My Profile](#)” | “[Logout](#)”, click on “**My Profile**”. Now you can view and edit your information.*



The Association of  
Accountants and  
Financial Professionals  
in Business

[www.imanet.org](http://www.imanet.org)  
<https://Linkup.imanet.org/carolinasregionalcouncil/home>  
<http://catawbavalley.imanet.org>

Look/Go here:

- \***Employment opportunities**
- \* **RSVP for the monthly meetings**
- \* **Give us feedback**

**IMA Catawba Valley Chapter**  
**P.O. Box 2132**  
**Hickory, NC 28603**

[http://www.linkedin.com/groups/Catawba-Valley-IMA-Chapter-4576209/about?trk=anet\\_ug\\_grppro](http://www.linkedin.com/groups/Catawba-Valley-IMA-Chapter-4576209/about?trk=anet_ug_grppro)  
<http://www.facebook.com/pages/Catawba-Valley-IMA-Chapter/133913923378743>

**Are you taking advantage of your IMA benefits?**

**IMA members are eligible for special offers from leading brand partners, providing discounts on:**

- **Insurance**
- **Office supplies**
- **Travel**
- **Executive recruitment**
- **Other business services**

*Learn more about these by visiting--[www.imanet.org](http://www.imanet.org) or calling 1-800-638-4427*

# CMA® Certification

Our Chapter has a rich history of almost two decades of providing support to members in earning the CMA. Many are enjoying the benefits of being a CMA because of this intensive support. Large discounts are currently available on Gleim review materials. [Click here](#) to find contact information for CMA Review. Take advantage of our experience and tell us your needs!



## Achieve success in 2017 with the help of a Professor-Led CMA Review

Presented by the Catawba Valley IMA Chapter and **GLEIM®**

### ON-DEMAND PERSONAL COACHING

#### Enjoy

- Premium Gleim CMA Review System
  - Unlimited access to professors
  - Extensive coverage of practice multiple-choice and essay questions
  - Access Until You Pass®

Per part **\$795**

Both parts **\$1,495**

Send contact information with payment to: IMA Catawba Valley Chapter  
PO Box 2132 | Hickory, NC 28603

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**Enroll Now! Class size is limited.**

Professor Ron Nicholson, CMA, MBA  
ronnicholson@compascable.net  
828.438.1019

### GLEIM DISCOUNT

All members of the Catawba Valley Chapter IMA may now purchase all CMA materials and online CPE at a discount of 20-30%. This includes pre-discounted sets. Standard shipping and handling will apply.

## Chapter Standings

For Transaction Period 5/1/2017 - 2/28/2018

Div	Standing	Chapter	Competition Members	Education Points	Certification Points	Membership Points	Chapter Service Points	Total Points
W	41	North Jersey Shore	65	1055	533	985	0	2573
W	42	South Central Minnesota	39	1624	0	929	0	2553
W	43	Coastal Fairfield County	61	1185	400	938	0	2524
W	44	Cedar Rapids	91	1552	0	968	0	2520
W	45	Catawba Valley	100	1506	0	990	0	2496

For Reference to make the top 10 in the Warner Division, at the end of February we needed :

W	10	Pikes Peak	79	1946	700	908	0	3554
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To be above 3,554 total points. We may be close, as Charlie Nartker and Lacy Sanchez will be making some classroom presentations in April, and there are a few more members who will be renewing this month. With no April meeting, we will not gain any education points. If you are interested in understanding what items drive these numbers, please refer to our Chapter Achievements Chart.

		Catawba Valley Goals for 2017-2018									
Calendar year is May 1-April 30		1	2	3	4	5	6	7	8	Completed	Notes
1	Publish <del>six</del> publicity items: Includes Meeting announcements, Events and Conference	5/7	8/20	9/6	10/8	12/1	1/5			Completed	Kim
2	Publish <del>six</del> additional publicity items:	2/4	3/6								Kim
3	Provide an IMA/CMA promotional mailing to potential members										
4	Sponsor a student night/event- a dedicated chapter meeting	9/21								Completed	Sept & March
5	Sponsor an IMA booth at a local job fair										
6	Provide formal mentoring opportunities for board members										Ongoing for chapter members
7	Make a guest presentation in classroom: discuss IMA certification opportunities										Ron/Chelsea others
8	Participate in a charitable event- REQUIRES multiple members	12/21								Completed	Christmas Family Mary, Danny, Ellen
9	Develop a written annual plan that aligns with Global's strategic plan										Board
10	Prepare an annual budget	12/15								Completed	Ellen/Beth
11	Hold regular scheduled board meetings	6/29	8/16								4 minimum
12	Hold a Chapter Management Session to train incoming officers										Ron
13	Publish 8 informational communications to board or chapter members	5/17	6/17	7/1	8/1	9/1	10/2	11/3	12/1	Completed	Newsletters-4 minimum
14	Publish 4 additional informational communications to board or chapter members	1/5	2/1	3/5	4/5						IMA newsletters
15	Provide support for a regional or council IMA activity	2/24								Completed	Winter Conference
16	<b>Two</b> board members attend Council's Spring Leadership Training Session or Chapter Leadership Effectiveness workshop										Ellen & Ron, Others?
17	Attend two volunteer leaders teleconference calls	5/8 Ellen	11/14 Ron	1/18 Ron						Completed	Any Board Member
18	Submit best practices ideas to the Chapter & Council Best Practices Forum										
19	Maintain more than 5 active board members for the year	3/31								Completed	Board
20	Publish an annual chapter program book of events or chapter roster										Lindsey/Rhonda
21	Facebook and LinkedIn										Links are on website
22	Sponsor Student Chapter										
23	Organize and Participate in a Plant Tour by a member of finance										
24	Have a chapter member serve on a Global Committee or Global Board of Directors										Ron & Ellen

25	Attend at least two council meetings (by telephone conference call)	Ellen 7/29	Ellen 10/20								Completed	Ron & Ellen
26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>											Publish by 3/31
<b>Items below are Extra Credit. These show our dedication to the CMA program and push us to winning a Banner each year</b>												
E1	Promote CMA certification in publication											2 success stories 25 points
E2	Director for CMA program position assigned, hold 2 activities for program											25 points-Ron
E3	Promote CMA through 2 special communications to a targeted group											50 points -NOT newsletter
E4	Promote CMA through a presentation to a university or targeted group											10 attendees 50 pts, 20 attendees 100 pts
E5	Establish structured mentoring relationship w/survey returned to Global for CMA Exam											1 relationship is 75 pts, 2 or more are 150 pts CMA review Ron
E6	Sponsor/actively co-sponsor CMA Review Course 3 classes w/review											3 classes is 100 pts, 6 classes is 200 pts
E7	Promote CMA to Corporate, Government or NonProfit of 5 or more											25 points